Create a Requisition Template Checklist

Navigation: Purchasing > Requisitions > Maintain Requisitions

1. ‘Add a New Value’ Tab – Enter/Verify Business Unit (BU).
2. Requisition ID – Where ‘Next’ should be enter ‘TMPLT-(short name of the vendor or user).
3. Click ‘Add’.
4. Verify/Enter the Origin field.
5. Enter ‘Requester’ (this usually defaults in).
6. Click the ‘Hold from further Processing’ box.
7. Click the “Header Defaults” hyperlink. Verify that the Override button is selected. Enter all information that will be the same for all items. A vendor could be selected here. Click OK. Enter your distribution here for the entire requisition.
8. Enter a description of ‘XXXXXXX’.
9. Enter the Quantity of 1.
10. Enter a unit of measure of ‘EA’.
11. Enter a category of ‘00505’
12. Click the Schedule Tab. Enter/Verify the Ship To, Due Date, Req Qty, and Price.
13. Click the Distribution hyperlink. Enter/Verify that the Location, Req Qty, GL Unit, Account, Operating Unit, Fund, DeptID, Class, have values entered. Click OK.
14. Click Save.
15. To copy this requisition into another requisition: (a) open a new requisition; (b) click on the ‘Copy From’ link at the bottom of the page; (c) select the appropriate requisition template.